Survey Crafter, Inc.

Survey Crafter Walkthrough

Summary:	Capturing web server environment information in a Survey Crafter Professional web survey
Walkthrough:	SCWT-SCP350-0517001
Applies to:	Survey Crafter Professional 3.5.0 or later
Торіс:	Surveys
Last Updated:	Monday, June 27, 2005
More Info:	Click here for more walkthroughs

Synopsis

This article describes a procedure for capturing web server environment information in a Survey Crafter Professional web survey.

Briefly, the following procedure has you do the following:

- 1. Add custom assignment rules to capture and store web server information in new imported variables
- 2. Change the settings in the *Web Survey Setup* dialog box to include the additional variables in your web survey's data file
- 3. When you are ready, publish your web survey

Notes

These instructions assume you are using Survey Crafter Professional 3.5.0 or later.

To determine what version of Survey Crafter Professional you are using, choose *About Survey Crafter Professional* from Survey Crafter Professional's *Help* menu.

Walkthrough

Step 1

Start Survey Crafter Professional and open the study file that contains the survey for which you would like to capture web server environment information.

Survey Crafter Professional displays the *Study* window.

📓 Survey Crafter Professional	
<u>File E</u> dit <u>V</u> iew <u>W</u> indow <u>H</u> elp	
📑 Study - Employ.mkt	
Surveys Data Analyses Variables	
Name Description E <u>d</u> it	
Employee Survey Software-R-Us Employee Survey <u>Info</u>	
<u>N</u> ew	
Ready	1.

Figure 1: Survey Crafter Professional's Study window

Step 2

On the *Surveys* tab of the *Study* window, double-click on the survey for which you would like to capture web server environment information.

Survey Crafter Professional displays the Survey Designer window for the survey.

10000					-	1-1-1-1
<u> </u> 5u	Jrve	y Crafter Professional - [Web Lay	out - Employ	yee Surv	'ey]	
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1.0						
		Software-R-Us Emplo	yee Satis	Taction	Survey	
	Ріва ћеір	se cake care in complecing the following ing to improve the quality of file at Solu	g survey. Your ware-R-Us.	anawars	will be insu	rumencal in
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Figure 2: The *Survey Designer* window

Step 3

Right-click anywhere in the *Survey Designer* window and choose *Custom Rules* from the pop-up menu.

Alternatively, choose *Custom Rules* from Survey Crafter Professional's *Block* menu.

Survey Crafter Professional displays the *Custom Rules* dialog box.

Custom Rules				×
View the custom r information, click (ules for the selected grou on the Help button.	p. To create a new rule, click on the Ne	ew button. For more	Close
Rule <u>G</u> roup:				<u>H</u> elp
Survey A - Emplo	oyee Survey			
Enable	Rule Type	Primary Description	Other Description	▲
En <u>a</u> ble Djsab	le <u>N</u> ew <u>C</u> opy	<u>Edit</u> <u>B</u> emove <u>L</u> ocate <u>L</u>	p <u>D</u> own <u>Import</u>	E <u>x</u> port

Figure 3: The *Custom Rules* dialog box

Step 4

Click on the *New* button at the bottom of the dialog box.

Survey Crafter Professional displays the *Custom Rule - New* dialog box.

Custom Rule - New	×
Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more [information, click on the Help button.	ОК
<u>R</u> ule Type:	Cancel
After Question Block, Go to QB	<u>H</u> elp
Rule <u>G</u> roup:	
Survey A - Employee Survey	Locate
After respondents complete question block:	
	Locate
Iake them to question block:	
	Lo <u>c</u> ate
C <u>A</u> lways	
	▲ <u>7</u> *
Description (Optional):	
	<u> </u>
	V

Figure 4: The *Custom Rule - New* dialog box

Step 5

Choose After Web Page, Assign Variable from the Rule Type drop down.

Survey Crafter Professional changes the remaining options in the dialog box.

Custom Rule - New	×
Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more information, click on the Help button.	OK
Rule Type:	Cancel
After Web Page, Assign Variable	<u>H</u> elp
Rule <u>G</u> roup:	
Survey A - Employee Survey	Locate
After respondents complete the web page that contains question block:	
▼	Locate
Assign the imported variable:	
	<u>S</u> elect
The <u>v</u> alue:	
	^ 7¥ ▼
C <u>A</u> lways	
	∴ 7¥
Description (Optional):	
	< ×

Figure 5: The After Web Page, Assign Variable custom rule

Step 6

Choose a question block from the *After respondents complete the web page that contains question block* dropdown.

The web survey script will assign the variable when the respondent clicks on the *Next* button on the page that contains the chosen question block.

For example, if you want to capture the date and time respondents complete your web survey, you may want to choose the last question block in your survey.

Step 7

Click on the Select button to the right of the Assign the imported variable box.

Survey Crafter Professional displays the Select Imported Variable dialog box.

Select Imported Variable	×
Name:	ОК
A1_PleaseInd_SoftwareSatisfact	Cancel
Name Code Quest	tion/Description
A1_PleaseInd_SoftwareSat A1_Pleas isfact work - Satisfaction	ur satisfaction. Then rank the 5. Software-R-Us as a place to
C A1_PleaseInd_TheCompan_ A1_Plea2 Satisfact Satisfact Satisfact	ur satisfaction. Then rank the 5. The company's training 1
A1_PleaseInd_YourCompe_S A1_Plea3 1. Please indicate you atisfact Software-R-Us - Satis	ur satisfaction. Then rank the 5. Your compensation at faction
4 Satisfac2 Satisfaction Structure - Satisfaction	ur satisfaction. Then rank the 5. The company's equity n
C A1_PleaseInd_YourHealt_Sat A1_Plea5 Software-R-Us - Satisfact Software-R-Us - Satis	ur satisfaction. Then rank the 5. Your health care benefits at faction
A1_PleaseInd_SoftwareIm_A1_Plea6 1. Please indicate you for portanc importance from 1 to 9 work - Importance Ra	ur satisfaction. Then rank the 5. Software-R-Us as a place to anking
A1_PleaseInd_TheCompan_I_A1_Plea7 1. Please indicate you mportanc importance from 1 to 9 program - Importance	ur satisfaction. Then rank the 5. The company's training Ranking
Info Edit Locate New	ir satisfaction. Then rank the

Figure 6: The Select Imported Variable dialog box

Step 8

If you have already created the imported variable you want to use to capture the information, click on the variable and skip to step 14. Otherwise, click on the *New* button at the bottom of the dialog box.

Survey Crafter Professional displays the Variable Information dialog box.

Variable Information	×
Lutomatically Generate Variable Information	ОК
<u>N</u> ame:	Cancel
CompleteDate	Help
<u>C</u> ode:	
Complete	
Description:	
Date and time respondents complete the web survey.	

Figure 7: The Variable Information dialog box

Step 9

Enter the name, code and description for the new variable.

It is useful to enter a name that you will be able to easily type, recognize and understand.

For example, if you would like to capture the respondent's IP address, *IPAddr* may be a good choice because the name is recognizable and easily understood.

If you would like to capture the respondent's remote user name, *RemUser* may be a good choice.

If you would like to capture the date and time respondents complete your survey, *CompleteDate* may be a good choice.

Note: The web server's remote user name environment variable rarely has any information since most browsers do not send user name information unless the web server has authenticated the respondent.

Step 10

Click on the OK button on the Variable Information dialog box.

Survey Crafter Professional displays the Variable Definition dialog box.

Variable - CompleteDate		×
Variable Type: C Category C Quantity C Literal	Based on <u>T</u> emplate: Standard Literal	OK Cancel <u>H</u> elp
Maximum Length: 250 characters Use a text substitution tal	ble:	

Figure 8: The Variable Definition dialog box

Step 11

Under *Variable Type*, choose the type of variable that is appropriate for the information you would like to capture from your web server.

For example, if you would like to capture the respondent's IP address or remote user name, choose *Literal*. If you would like to capture the date and time respondents complete your survey, choose *Literal*.

Step 12

Set the remaining options for the variable.

For example, if you would like to capture the respondent's IP address, you may want to set *Maximum Length* to 11 characters (123.567.901).

If you would like to capture the date and time respondents complete your survey, set *Maximum Length* to the number of characters needed to display the date and time. For example, "2005/06/26 07:35" uses 16 characters.

Step 13

Click on the OK button on the Variable Definition dialog box.

Survey Crafter Professional adds the new variable to the variables listed in the *Select Imported Variable* dialog box.

Select	t Imported Variable				×
<u>N</u> ame	e:				ок
Com	pleteDate				Cancel
	Name	Code	Question/Description	•	
14	A23_PleaseInd_IWorkAnAppr opriate	A23_Ple4	 Please indicate how strongly you agree or disagree with each statement. I work an appropriate number of hours each week. 		<u>H</u> elp
15	A23_PleaseIndic_IFeelEmpo weredTo	A23_Ple5	 Please indicate how strongly you agree or disagree with each statement. I feel empowered to make decisions at Software-R-Us. 		
16	C A23_PleaseIndic_IFeelComfor table	A23_Ple6	 Please indicate how strongly you agree or disagree with each statement. I feel comfortable speaking my mind to company management. 		
17	CA23_PleaseIn_ManagementIs Interes	A23_Ple7	 Please indicate how strongly you agree or disagree with each statement. Management is interested in what I have to say. 		
18	CA20_WhatIsYourAge	A20_What	3. What is your age?		
19	A21_WhatIsYourGender	A21_What	4. What is your gender?		
20	LA22_KeepingInMindIFA1_Ple ase	A22_Keep	5. Keeping in mind IF (A1_PleaseInd_SoftwareIm in question 1, do you have any suggestions about how Software-R-Us can be made a better place t		
21	CompleteDate	Complete	Date and time respondents complete the web survey.		
22	LinkNo	LinkNo	LinkNo	•	
lnf	io Edit	<u>N</u> ew			

Figure 9: The Select Imported Variable dialog box

Step 14

Click on the OK button on the Select Imported Variable dialog box.

Survey Crafter Professional shows the variable under *Assign the imported variable* in the *Custom Rule - New* dialog box.

Custom Rule - New	×
Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more [ОК
<u>R</u> ule Type:	Cancel
After Web Page, Assign Variable	<u>H</u> elp
Rule <u>G</u> roup:	
Survey A - Employee Survey	Locate
After respondents complete the web page that contains question block:	
Block A22 - 5. Keeping in mind IF (A1_PleaseInd_SoftwareIm in question 1, do you have any suggesti 💌	L <u>o</u> cate
Assign the imported variable:	
CompleteDate	Select]
The <u>v</u> alue:	
	7¥ ▼
○ <u>A</u> lways	
	∴ 7 <u>*</u>
Description (Optional):	
	A V

Figure 10: The After Web Page, Assign Variable custom rule

Step 15

Click on the Expression Builder button to the right of the box under The value.

Survey Crafter Professional displays the *Expression Builder* dialog box.

xpression Builder - Return Literal	×
Build your expression in the box. Click on a button, drag or double-click on an item in a list to insert the item in your expression. For examples, click on the Info and Help buttons.	OK Cancel
	<u>Save</u>
	Library
	<u>I</u> est
Fn = < < / % / % AND OR NOT () TRUE FALSE NV NR	
Groups: All return types 💽 Eunctions, Operators and Variables: Values:	
Arithmetic Operators A22_KeepingInMindIFA1_Please NV	<u>I</u> nfo
Comparison Operators LinkNo	<u>H</u> elp
Literal Uperators	
LompleteDate	
Data and time respondents complete the web survey	
▼	

Figure 11: The *Expression Builder* dialog box

Step 16

Do one of the following:

 If you want to capture the respondent's IP address or remote user name, click on Web Functions under Groups, double-click on WEBSERVER_ENV under Functions, Operators and Variables and replace NAME in the expression box with "REMOTE_ADDR" or "REMOTE_USER". For example, if you want to capture the respondent's IP address, the expression should look like the following:

WEBSERVER_ENV("REMOTE_ADDR")

To see examples as well as a list of options offered by the *WEBSERVER_ENV* function, click on the *Info* button on the *Expression Builder* dialog box.

 If you want to capture the date and time from your web server, click on Date/Time Functions under Groups, double-click on FORMAT_LOCALTIME, replace DATEFORMAT-NUMBER in the expression box with 1 and timeformatnumber with 3. The expression should look like the following:

FORMAT_LOCALTIME(1,3)

To see examples as well as a list of the formatting options offered by the *FORMAT_LOCALTIME* function, click on the *Info* button on the *Expression Builder* dialog box.

Survey Crafter Professional displays your expression in the box.

Expression Builder - Return Literal	×
Build your expression in the box. Click on a button, drag or double-click on an item in a list to insert the item in your expression. For examples, click on the Info and Help buttons.	OK
FORMAT_LOCALTIME(1, 3)	
	<u>S</u> ave
	Library
	<u>I</u> est
Fn = > < <> + · * / % AND OR NOT () TRUE FALSE NV NR	
Groups: All return types 💽 Eunctions, Operators and Variables: Values:	
Comparison Operators FORMAT_LOCALTIME Date/Time Functions	<u>I</u> nfo
Literal Functions LOCALTIME_PART	<u>H</u> elp
Literal Uperators Literal Variables	
Logical Functions	
Quantity Variables	
FORMAT_LOCALTIME(DATEFORMATNUMBER, timeformatnumber)	
Returns the current date and time formatted as a literal value.	
▼	

Figure 12: The *Expression Builder* dialog box

Step 17

Click on the OK button on the Expression Builder dialog box.

Survey Crafter Professional displays your expression under *The value*.

Custom Rule - New	×
Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more information, click on the Help button.	ОК
<u>R</u> ule Type:	Cancel
After Web Page, Assign Variable 📃	<u>H</u> elp
Rule <u>G</u> roup:	
Survey A - Employee Survey	Locate
After respondents complete the web page that contains question block:	
Block A22 - 5. Keeping in mind IF (A1_PleaseInd_SoftwareIm in question 1, do you have any suggesti 💌	L <u>o</u> cate
Assign the imported variable:	
CompleteDate	<u>S</u> elect
The <u>v</u> alue:	
FORMAT_LOCALTIME(1, 3)	<u>^</u>
	<u> </u>
C Always 💽 When the following condition is true:	
	2×
Description (Aptional):	_

Figure 13: The After Web Page, Assign Variable custom rule

Step 18

Do one of the following:

- If you want Survey Crafter Professional to always assign the variable, choose Always.
- If you want Survey Crafter Professional to assign the variable only under certain conditions, choose *When the following condition is true* and click on the *Expression Builder* button to the right of the box. Use the *Expression Builder* dialog box to write your expression and click on the *OK* button. To get help writing your expression, click on the *Help* button on the *Expression Builder* dialog box.

For example, if you want Survey Crafter Professional to assign the variable only once, choose *When the following condition is true* and enter an expression like *Complete-Date=NV*. This tells Survey Crafter Professional to assign the *CompleteDate* variable

only when its value is NV (No Value).

Custom Rule - New	×
Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more information, click on the Help button.	ОК
Bule Type:	Cancel
After Web Page, Assign Variable	<u>H</u> elp
Rule <u>G</u> roup:	
Survey A - Employee Survey	Locate
After respondents complete the web page that contains question block:	
Block A22 - 5. Keeping in mind IF (A1_PleaseInd_SoftwareIm in question 1, do you have any suggesti 💌	L <u>o</u> cate
Assign the imported variable:	
CompleteDate	<u>S</u> elect
The <u>v</u> alue:	
FORMAT_LOCALTIME(1, 3)	7¥ ↓
○ Always	
CompleteD ate=NV	~
Description (Optional):	
	A F

Figure 14: The After Web Page, Assign Variable custom rule

Step 19

If you want, enter a description for your rule.

Enter a description that will help you or others recognize the rule and understand what the rule is doing.

Custom Rule - New	×
Choose the type of rule you want. The type of rule you choose determines the rule's remaining options. For more [ОК
Rule Type:	Cancel
After Web Page, Assign Variable	<u>H</u> elp
Rule <u>G</u> roup:	
Survey A - Employee Survey	Locate
After respondents complete the web page that contains question block:	
Block A22 - 5. Keeping in mind IF (A1_PleaseInd_SoftwareIm in question 1, do you have any suggesti 💌	L <u>o</u> cate
Assign the imported variable:	
CompleteDate	<u>S</u> elect
The <u>v</u> alue:	
FORMAT_LOCALTIME(1,3)	
C <u>A</u> lways ⊙ <u>W</u> hen the following condition is true:	
CompleteD ate=NV	^ 7¥
Description (Optional):	
Assigns the CompleteDate imported variable the current date/time in YYYY/MM/DD HH:MM:SS format when the respondent completes the web survey. Assigns the variable only once.	

Figure 15: The After Web Page, Assign Variable custom rule

Step 20

Click on the OK button on the Custom Rule - New dialog box.

Survey Crafter Professional adds the *After Web Page, Assign Variable* rule to the list on the *Custom Rules* dialog box.

C	uston	n Rules				×
۱ i	View tł informa	he custor ation, clic	m rules for the selected grou k on the Help button.	up. To create a new rule, click on the N	lew button. For more	Close
	Rule <u>G</u>	įroup:				<u>H</u> elp
	Surve	yA-Em	ployee Survey		▼	
		Enable	Rule Type	Primary Description	Other Description	▲
	1	ব	After web page, assign variable	Block A22 - 5. Keeping in mind IF (A1_PleaseInd_SoftwareIm in question 1, do you have any suggesti	CompleteDate	
						•
	En <u>a</u> t	ole Dis	able <u>New</u> <u>C</u> opy	<u>E</u> dit <u>R</u> emove <u>L</u> ocate	Up Down Import	E <u>x</u> port

Figure 16: The Custom Rules dialog box

Step 21

Repeat steps 4 through 20 for each additional piece of information you wish to capture from your web server.

For example, if you want to capture both the respondent's IP address and the date and time respondents complete your survey, you need to add two *After Web Page, Assign Variable* rules to your survey.

Step 22

Click on the Close button on the Custom Rules dialog box.

Step 23

Choose Web Survey Setup from Survey Crafter Professional's Web menu.

If the *Web* menu is not available, choose *Web Layout* from the *View* menu. Then choose *Web Survey Setup* from the *Web* menu.

Survey Crafter Professional displays the *Template* tab of the *Web Survey Setup* dialog box.

eb Survey Setup
Template Formatting Navigation Respondent Processing Data File Feedback
Web Survey Template Options Generate Standalone HTML Files Litle: Survey Crafter Example - Software-R-Us Employee Satisfaction Survey Background Image URL [Example: http://www.mycompany.com/graphics/logo.gif]:
Merge with an HTML Template File: C:\Survey Crafter\2005\Documents\Website\Examples\Surveys\Studies\Templates\Employ Eind Eind
Name of Anchor Tag to Replace:
Help Cancel < Back

Figure 17: The *Template* tab of the *Web Survey Setup* dialog box

Step 24

Click on the Data File tab of the Web Survey Setup dialog box.

Survey Crafter Professional displays the Data File tab of the Web Survey Setup dialog box.

Web Survey Setup	×
Template Formatting Navigation Respondent Processing Data File	Feedback
- Variables to Include in the Data File	
Include only variables associated with the survey	
Include only variables associated with the study	
 Include an imported variables in the <u>study</u> Include an imported variables also additional instantial variables 	·····
 Include survey variables plus additional imported variables 	
Order of Variables Included in the Data File	
List variables in the order of appearance in the survey	
○ List variables in alphabetical order	
C List variables in <u>c</u> ustom order	<u>O</u> rder
Records to Include in the Data File	
Include no data records	
C Include all existing data records	
C Include data records for which the following expression is true:	
	A 7%
Help Cancel < Back Next >	<u>F</u> inish

Figure 18: The Data File tab of the Web Survey Setup dialog box

Step 25

Under Variables to Include in the Data File, select Include survey variables plus additional imported variables.

Choosing this option instructs Survey Crafter Professional to also include variables that are not associated with your web survey.

Step 26

Click on the Add button to the right of Include survey variables plus additional imported variables.

Survey Crafter Professional displays the Web Survey Data File - Add Variables dialog box.

W	eb Survey	/ Data File -	Add Variables					×
	Use the but	tons below to	add or remove variat	bles not ass	ociated with	the web survey.		ОК
	Code LiekNo	LinkNo	Name	LinkNo	Question/D	escription		Cancel
		LINKING						Help
		- 1		1 -		1	⊒	
	Add	<u>R</u> emove	<u>U</u> p <u>D</u> own	Tob	Bottom	Alphabetica	d	

Figure 19: The Web Survey Data File - Add Variables dialog box

Step 27

Click on the *Add* button at the bottom left corner of the dialog box.

Survey Crafter Professional displays the Select Imported Variable dialog box.

Select Ir	mported ¥ariable			×
<u>N</u> ame:				ОК
Complet	teDate			Cancel
Name		Code	Code Question/Description	
1	- LompleteDate	Lomplete	Date and time respondents complete the web survey.	<u>H</u> elp
Info	Edit Locate	New		
	Egen Epodio	<u></u>		

Figure 20: The Select Imported Variable dialog box

Step 28

Click on one of the variables you created in steps 4-21 and then click on the OK button.

Survey Crafter Professional displays the selected variable in the *Web Survey Data File - Add Variables* dialog box.

eb Survey	y Data File - Add Variables		3
Jse the but	tons below to add or remove vari	iables not associated with the web survey.	OK
Code	Name	Question/Description	Cancel
inkNo	LinkNo	LinkNo	
Complete	CompleteDate	Date and time respondents complete the web survey.	Help
		_	
	Remove Up Down		
		Tob Forrow Vibuaperical	

Figure 21: The Web Survey Data File - Add Variables dialog box

If you make a mistake or decide to remove a variable, click on the variable and then click on the *Remove* button at the bottom of the dialog box.

Step 29

Repeat steps 27 and 28 until you have added all of the variables you created in steps 4 through 20.

Step 30

Click on the OK button on the Web Survey Data File - Add Variables dialog box.

The variable(s) you created in steps 4 through 20 will be included in your web survey's data file the next time you publish your web survey.

Step 31

Click on the Finish button on the Web Survey Setup dialog box.

Step 32

Choose Save from Survey Crafter Professional's File menu to save your study file.

Step 33

Specify other setup options for your web survey. When you are ready, publish and post your web survey on your website.

For information about setup options for your web survey as well as instructions for publishing your web survey, read the online book <u>Surveying on the Web.</u> You can access the

online book by choosing *Surveying on the Web* from Survey Crafter Professional's *Help* menu.